

## Overview of the *First Gift* Program

- Philanthropy has been a part of the Naval Academy since its inception. Midshipmen funded the Mexican Monument in the late 1840's, and in the 1890's Robert Means Thompson, USNA 1868, hired and personally paid for architect Earnest Flagg to design the Naval Academy that we know today.
- The Naval Academy Foundation helps to make a great deal of the programs that benefit midshipmen a reality through charitable gifts from alumni, parents and friends. Programs such as the Academic Center, International Programs (LREC), the STEM Conference, and Forrestal Lectures are all partially funded through charitable gifts. Private gift support also paid to renovate the stadium, build the Brigade Sports Complex, and partnered with federal funding, built Alumni Hall, the Visitor's Center, and renovated both Preble Hall and Hubbard Hall.
- Prior to the *First Gift* program, donor participation among young alumni (within 15 years of graduation) was less than 7% (vs. a 26% participation rate of all alumni), and classes on average raised \$100 thousand leading up to their 10<sup>th</sup> reunion. The chart below illustrates how these statistics have changed since the implementation of *First Gift*.

	Class of 2009	Class of 2010	Class of 2011	Class of 2012	Class of 2013	Class of 2014	Class of 2015	Class of 2016	Class of 2017
Participation	70.15%	50.80%	29.48%	49.7%	60%	55%	52%	47%	51%
# of donors	564	450	247	409	647	579	599	504	604
Average monthly gift size	\$10.85	\$7.94	\$8.31	\$8.01	\$6.44	\$9.70	\$7.16	\$7.15	\$10
Total after 10 years	\$734,828	\$428,760	\$246,308	\$393,130	\$500,001	\$673,956	\$514,660	\$432,432	\$543,600

- The Class of 2018 has the capability to raise over \$1.5 million to give to the Academy at its 10-year reunion if 60% of classmates give the maximum of \$20.18 per month for 10 years!

### How does *First Gift* work?

- First Gift* replicates a long-standing initiative at West Point that encourages and facilitates charitable giving for a graduating class through monthly payroll allotment. The recommended gift for '18 graduates is \$20.18, but we can process any gift greater than the minimum \$10 per month. \$20.18 will buy about two burgers and beers—not a big impact on an individual, but a huge impact on the Academy when multiplied by 12 months and 10 years and hundreds of classmates!
- Allotments will continue until a participant changes/cancels an allotment or leaves the military, and the USNA Foundation website has a page for each *First Gift* class that contains links and instructions to help alumni with their giving.
- All gifts to the Naval Academy Foundation are 100% tax-deductible, and all donors receive a tax receipt in January following the close of the prior tax year.

- Unless otherwise directed, your gifts will be split 75%/25% with 75% being applied to a restricted fund that will support the Class of 2018's 10-year reunion Class Project (determined at a later date and chosen from the Supe's priority list), and 25% to the USNA Annual Fund.

***First Gift progress report: Class of 2008 & 2009***

- The Class of 2008 was the inaugural *First Gift* class and began their 3-year class project solicitation in 2016. They elected to support the Midshipmen Action Group (MAG).
- They have raised \$340,790 since graduation, including nearly \$89,000 since 2016 towards their additional \$100K goal before their reunion in 2018.
- The Class of 2009 began their 3-year class project solicitation in 2017. They elected to support the International Programs Office (IPO).
- They have raised \$579,662 since graduation and began their solicitation for an additional \$100K in October 2017. This will be the largest 10-year reunion gift in the history of the Academy!

# RE: Class of 2018 First Gift Brief

10 - Class of 2018



**Rusty Yeiser** (b) (6)

Fri, Oct 27,  
2017, 9:47 R  
AMep  
ly

to me

Thanks (b) (6) copy all.

1130, 7 November, Club. See you then.

Rusty

**From:** (b) (6) [mailto:(b) (6)@usna.edu]  
**Sent:** Friday, October 27, 2017 09:37  
**To:** Rusty Yeiser <(b) (6)>  
**Subject:** Re: Class of 2018 First Gift Brief

Let's aim for the 7th!

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

On Fri, Oct 27, 2017 at 9:35 AM, Rusty Yeiser (b) (6) > wrote:  
(b) (6)

Sorry, forgot to propose a date ... either the 7<sup>th</sup> or 8<sup>th</sup> work for me.

Rusty

**From:** (b) (6) [mailto:(b) (6)@usna.edu]  
**Sent:** Friday, October 27, 2017 09:25  
**To:** Rusty Yeiser (b) (6) >  
**Cc:** Melissa Nelson (b) (6) >; Rich Goldsby  
<(b) (6)>  
**Subject:** Re: Class of 2018 First Gift Brief

CAPT Yeiser,

Not a problem, Sir, and I am happy to meet with you. I am available at lunchtime either Tues or Wed, 7 or 8 Nov.

V/r,

(b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy

(b) (6) (o)

(b) (6) (c)

On Fri, Oct 27, 2017 at 9:08 AM, Rusty Yeiser (b) (6) > wrote:

(b) (6)

As it happens, I now have a commitment that will keep me out of the office on the 15<sup>th</sup>. Melissa and Rich Goldsby '72 will cover the meeting with you and your class officers that day.

I would like to take an opportunity to give you a bit of background on the program before you sit down with the mids, Rich, and Melissa.

Next week I'm in Philadelphia most of the week leading up to the game on Thursday, but I'll be back in the office on Friday the 3<sup>rd</sup>, and the following Mon, Tues, and Wed (6-8 Nov) I'm available as well. Might you be available for about a half hour one of those days ... lunch at the club is an option as well?

Sorry to complicate this a bit.

Thanks for considering.

v/r,

Rusty

**From:** (b) (6) [mailto:(b) (6)@usna.edu]

**Sent:** Thursday, October 26, 2017 15:15

**To:** Rusty Yeiser (b) (6) >

**Cc:** Melissa Nelson (b) (6)

**Subject:** Re: Class of 2018 First Gift Brief

CAPT Yeiser,

I have a meeting from 1000-1100 that often times runs over. If it looks like we are not wrapping up that day by 1100 I will reach out. Otherwise I will plan to be there at 1130!

V/r,

(b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

On Thu, Oct 26, 2017 at 9:32 AM, Rusty Yeiser <(b) (6)> wrote:  
Thanks (b) (6) Sounds like a plan.

Let's give ourselves just a bit more runway in case you have some additional questions ...  
1130 at Drydock on the 15<sup>th</sup>?

v/r,

Rusty

**From:** (b) (6) [mailto:(b) (6)@usna.edu]  
**Sent:** Thursday, October 26, 2017 09:27  
**To:** Rusty Yeiser (b) (6) (b) (6) >  
**Cc:** Melissa Nelson <(b) (6)>  
**Subject:** Re: Class of 2018 First Gift Brief

Thank you so much for the offer, Sir. To save you two trips, would it be possible to meet with you 15 min earlier on the 15th to learn a little more background information?

V/r,

(b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

b

On Thu, Oct 26, 2017 at 9:20 AM, Rusty Yeiser <(b) (6)> wrote:

Commander (b) (6),

Glad you can join us on the 15<sup>th</sup>.

It occurred to us that you will be hearing about the First Gift program for the first time on the 15<sup>th</sup>. If you would like, Melissa and I would be happy to come to Bancroft and give you a bit more background on the program and the Foundation in advance of our lunch meeting with you and your class officers. No more than 20 – 30 minutes max ... it would be the same brief we gave the Commandant and DepDant earlier this fall.

Let us know if you'd like to do this; our schedule can accommodate yours. Thanks for your consideration.

v/r,

Rusty Yeiser

**Rusty Yeiser | Captain, U.S. Navy (Ret.) '74**

Senior Director, Annual Programs | U.S. Naval Academy Foundation

P: (b) (6) C (b) (6) F: (b) (6)

(b) (6)

**From:** Melissa Nelson

**Sent:** Thursday, October 26, 2017 09:12

**To:** (b) (6) (b) (6) @usna.edu>

**Cc:** (b) (6) @usna.edu; Rusty Yeiser <(b) (6)>

**Subject:** RE: Class of 2018 First Gift Brief

Commander,

Wonderful! We are glad you will be able to join us, and we look forward to meeting you.

Best,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6)

**From:** (b) (6) [mailto:(b) (6)@usna.edu]  
**Sent:** Thursday, October 26, 2017 9:09 AM  
**To:** Melissa Nelson <(b) (6)>  
**Cc:** (b) (6)@usna.edu  
**Subject:** Re: Class of 2018 First Gift Brief

Thank you, Ms. Nelson. I have added it to my calendar, and I am looking forward to meeting you!

V/r,  
CDR (b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

On Thu, Oct 26, 2017 at 8:26 AM, Melissa Nelson (b) (6) > wrote:  
Good morning Commander (b) (6)

In your role as 2018's class rep, I write to make you aware of a program the Foundation pursues with each graduating class and to invite your participation as we brief the class officers.

The attached describes the FIRST GIFT program, which has been in place since the class of 2008. Successive Superintendents and Commandants have all been briefed and support the program.

We've been in touch with '18's president, (b) (6) (copied here), and we are meeting with the class leadership on Wednesday, November 15<sup>th</sup> in the Dahlgren cafeteria from 12:00 – 13:00. If you're available, we'd welcome the opportunity to include you in that brief in the hope that you'd lend your encouragement to their efforts.

I hope you'll be able to join us, and please do not hesitate to contact me with any questions.

Best regards,

Melissa

Melissa Nelson  
Coordinator, Class Giving Programs  
USNA Alumni Association & Foundation  
[291 Wood Road](#), Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)



# Class of 2018 Battalion Receptions

10 - Class of 2018



Noreen Frenaye (b) (6) >

Mon, Dec 18,  
2017, 3:25 PM R

to (b) (6) @usna.edu, (b) (6) @usna.edu, (b) (6) @usna.edu, (b) (6) @usna.edu, me

Good afternoon,

I have obtained the dates from USNA for the 1/C Battalion Receptions and have noted them below. For those of you not familiar, we invite the 1/c over, 1 battalion at a time, to introduce them to the Alumni Association & Foundation. While there is a little bit of speaking, they are low key receptions (dinner). Perhaps those familiar with these could inform the new Battalion Officers? Once our invitation is created, it will be sent to all of you to send out to all 1/C members of their battalion. I will prepare the email I send to you in a way that you are able to simply forward to the 1/c if you'd like. They will **need to RSVP** to us to ensure we have enough food. In the past, some battalion officers have created a list and simply sent that to me – whatever you find easier is fine; **let me know what process you will follow**. Some of these dates fall on nights where there may be a conflict for some members of the battalion. If there is a conflict, for any reason, the midshipmen may RSVP for another reception – we must however receive an RSVP from them to ensure we have enough food. Please encourage them to attend a different reception if they are unable to attend their own. Please also let them know to **RSVP by the RSVP date** – many respond the day of and this just doesn't help us with the caterer. We will only use the 7 March date if we need to cancel one of the others due to the weather.

You are invited to all of the receptions as well as Company officers and SELs; please forward the invitation to them when you receive it and feel free to forward this email to them now in order for them to save the date. You are all welcomed to bring your significant other – just RSVP for both of you providing us with the person's name so we may create a nametag. For those of you who have attended these, it is always helpful to have an officer or two on each floor of our building, especially during the talking part. As part of the Another Link in the Chain program, the Class of 1968 will have representatives attend the receptions as well. After a few remarks, there are several great raffle prizes awarded to those in attendance. The food and drinks are usually enjoyed and welcomed by all.

Whatever I can do to assist maximum participation, please let me know. Once they attend, they are glad they did, it's getting them here that can be challenging, especially the first one.

17 January – 1<sup>st</sup> Batt

24 January – 2<sup>nd</sup> Batt

31 January – 3<sup>rd</sup> Batt

8 February – 4<sup>th</sup> Batt

21 February – 5<sup>th</sup> Batt

28 February – 6<sup>th</sup> Batt

7 March – Weather Alt (if any of the above need to be cancelled due to weather)

**CDR (b) (6), as the Class O Rep, you will of course be invited to all receptions.**

If you have any questions, please do not hesitate to contact me. Thank you for your support.

Merry Christmas to you all.

V/r,

*Noreen Frenaye*

Director, Alumni Travel and

Assoc Director, Alumni Special Programs

U.S.Naval Academy Alumni Association & Foundation

(O) (b) (6)

Website: [www.usna.com](http://www.usna.com)

*Where in the World will you travel with Us?* [www.usna.com/travel](http://www.usna.com/travel)

Facebook: [www.facebook.com/usnaalumni](http://www.facebook.com/usnaalumni)

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# Updating Alumni Association Online Account Info and RSVPing for the Final AA Reception

10 - Class of 2018



(b) (6) @usna.edu>

Fri, Feb 16,  
2018, 9:44 R  
AMep  
ly

to Midn\_2018.all, me, (b) (6), (b) (6), (b) (6)

Shipmates,

Congratulations on making it to within 100 Days to Graduation! Hopefully all of you who did 100's Night last night enjoyed it, even though our "Detailers" obviously did not read and abide by the SOP.

## Last 2 AA Receptions at Ogle Hall:

There are only 2 more Receptions for our class: 5th Batt on 21FEB, and 6th Batt on 28FEB. If you are in Batts 1-4 and were unable to attend your own reception, you can still attend the 6th Batt Reception by sending a RSVP email to Ms. Noreen Frenaye (b) (6) by 21FEB. Based off of the menu rotation from Receptions 1-4, the menu at the next two should be Italian and Continental, respectively.

## First Gift:

Everyone who has been to the Receptions, please continue thinking about this incredible way to give back to the Academy. For those who have yet to go, please make sure to make time at the Reception to listen to how this program directly provides for the improvement of various events and programs here at the Naval Academy.

## Updating Account Info:

For all of you who have been able to make it to a reception at the Alumni House so far, you should have gotten this info, but here are some directions for **everyone** to update their account on [usna.com](http://usna.com) (**everyone already has an account made for them**):

If you would please remind your classmates to go into [www.usna.com](http://www.usna.com) and update their contact information. Reminder on the Login. User ID is m18XXXX and the Password is (b) (6). Just ask them to be sure to put in an email address, cell phone, and a home of record for now. They can update their email preferences so they aren't overwhelmed with emails. Just de-select everything that they don't need and try to keep the key info coming in. Messages from Class leadership, perhaps the Chapter. President of the AA, Supe, Alumni Events, Wavetops is good....

I promise that the [usna.com](http://usna.com) account is not a scam; it really is a great way to stay connected and network once we graduate.

Have a great weekend!

# Thank you Class of 2018

10 - Class of 2018



Noreen Frenaye (b) (6)

Mon, Mar 5,  
2018, 11:13 R  
AMep  
ly

to me, (b) (6) (b) (6)

Good morning,

Once again, thank you for assisting with communicating with Class of 2018 with regards to their attendance at the Battalion Receptions. If you could forward this email to them, we'd appreciate it very much. We find this useful not only to those who were unable to attend, but to those who did as well. Not know how & who you'd like to distribute, I've included everyone on this email.

Class of 2018,

For those of you able to attend one of the recent Battalion Receptions, we want to take this opportunity to thank you. We hope you enjoyed some relaxing time and a good meal with your classmates, Class of 1968 and learning how the Alumni Association can assist you through the years after graduation. Photos can be found on our Facebook page: [www.facebook.com/usnaalumni](http://www.facebook.com/usnaalumni)

Below is information shared with you at the battalion receptions. We know the talks go quickly and find this to be helpful. For those unable to attend any of the receptions, if you have any questions regarding the below, please do not hesitate to ask.

Quite a bit of information can be found on our website at [www.usna.com](http://www.usna.com) . If you have not already signed up for a User ID/password, yours is: User name is: m18XXXX Password is (b) (6)

**Some important items on the website** – Under the Stay Connected Tab, Find my Chapter. This is a great tool as you move through your career – connecting with local alumni no matter where you are located. The Alumni Mentoring Program (AMP) is another great resource for you: <https://www.usna.com/AMP> There are many mentors and protégés signed up – join them and find someone who can help guide you through your career. Your membership benefits are listed as well as information on your class ring should you lose it or need it resized etc.

You were also briefed about First Gift. Below, please find information regarding this:

Since 2008, First Gift (monthly payroll allotment starting after graduation) has created a way for the graduating class to give back to the Academy. High participation is the key to turning small monthly allotments into a big 10 year reunion gift to the Academy!

**Donations from alumni make a good Naval Academy truly great!**

Alumni gifts help fund Distinguished Military Professors, International Programs, '63 Center for Academic Excellence, NOLS Scholarships, athletics at all levels, Brigade Sports Complex, the Cyber Security program and new Cyber building, Gettysburg Leadership Encounter, NAFAC and much more. That amounts to **\$668+ million in alumni support since 2000!**

Questions about First Gift? (b) (6) or Melissa Nelson, USNA Foundation (b) (6) or (b) (6)

All other questions may be sent to me.

Thank you,

*Noreen Frenaye*

Director, Alumni Travel and

Assoc Director, Alumni Special Programs

U.S.Naval Academy Alumni Association & Foundation

(O) (b) (6)

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# Final Battalion Reception attendance & participation numbers

10 - Class of 2018



**Noreen Frenaye** (b) (6) >

Fri, Mar 2,  
2018, 8:51 R  
AMep  
ly

to me, (b) (6) (b) (6)

Good morning,

Thank you all for your assistance with this year's battalion receptions. I hope that all the midshipmen who were able to attend enjoyed themselves. Below are the final attendance & participation numbers for the Class of 2018. Not only was it important to have high attendance, but also high participation in the two information stations. We've already been able to assist one member who will be graduating but will not be receiving their commission! This is what it's all about. Over the next couple of days, I will send an email to you that I'd like to be sent to Class of 2018 – it'll summarize what information we passed along to them which will of course be great for those who were unable to attend any of the receptions. If you have any questions, please let me know. I will be out of the office 7-13 March with limited access to email.

Thank you,

*Noreen Frenaye*

Director, Alumni Travel and  
Assoc Director, Alumni Special Programs  
U.S. Naval Academy Alumni Association & Foundation  
(O) (b) (6)

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Please consider the environment before printing this email.



Shannon Campbell <scampbel@usna.edu>

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## Fwd: Class of 2018 First Gift Brief

1 message

---

(b) (6) i@usna.edu>  
To: Shannon Campbell <scampbel@usna.edu>

Tue, May 22, 2018 at 11:53 AM

Ms. Campbell,

Please see the below email showing the initiation of the USNA Alumni Association & Foundation to begin the process for creating the Class of 2018 First Gift.

V/r,  
CDR (b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

----- Forwarded message -----

From: **Melissa Nelson** <(b) (6) (b) (6)>  
Date: Thu, Oct 26, 2017 at 8:26 AM  
Subject: Class of 2018 First Gift Brief  
To: "(b) (6) @usna.edu" (b) (6) @usna.edu>  
Cc: (b) (6) @usna.edu" (b) (6) @usna.edu>

Good morning Commander (b) (6),

In your role as 2018's class rep, I write to make you aware of a program the Foundation pursues with each graduating class and to invite your participation as we brief the class officers.

The attached describes the FIRST GIFT program, which has been in place since the class of 2008. Successive Superintendents and Commandants have all been briefed and support the program.

We've been in touch with '18's president, (b) (6) (copied here), and we are meeting with the class leadership on Wednesday, November 15<sup>th</sup> in the Dahlgren cafeteria from 12:00 – 13:00. If you're available, we'd welcome the opportunity to include you in that brief in the hope that you'd lend your encouragement to their efforts.

I hope you'll be able to join us, and please do not hesitate to contact me with any questions.

Best regards,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6)



**Class of 2018 First Gift Overview.docx**  
158K





Shannon Campbell <scampbel@usna.edu>

## Fwd: Thank you Class of 2018

1 message

(b) (6) @usna.edu>  
To: Shannon Campbell <scampbel@usna.edu>, (b) (6) @usna.edu>

Tue, May 22, 2018 at 12:42 PM

Ms. Campbell,

This is the last email I have concerning the Class of 2018 First Gift.

V/r,  
CDR (b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy  
(b) (6) (o)  
(b) (6) (c)

----- Forwarded message -----

From: Noreen Frenaye <(b) (6)>  
Date: Mon, Mar 5, 2018 at 11:13 AM  
Subject: Thank you Class of 2018  
To: (b) (6) @usna.edu", (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>  
Cc: (b) (6) @usna.edu>, (b) (6) @usna.edu>, (b) (6) @usna.edu>

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[www.facebook.com/usnaalumni](http://www.facebook.com/usnaalumni)

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Questions about First Gift? (b) (6) or Melissa Nelson, USNA Foundation (b) (6) or (b) (6)

All other questions may be sent to me.

Thank you,

*Noreen Frenaye*

Director, Alumni Travel and  
Assoc Director, Alumni Special Programs  
U.S. Naval Academy Alumni Association & Foundation  
(O) (b) (6) (b)

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Facebook: [www.facebook.com/usnaalumni](http://www.facebook.com/usnaalumni)

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Shannon Campbell <scampbel@usna.edu>

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## Fwd: USNA Foundation First Gift Program Class of 2018

1 message

---

(b) (6) @usna.edu>  
To: Shannon Campbell <scampbel@usna.edu>

Tue, May 22, 2018 at 11:56 AM

Ms. Campbell,

Follow-up email from our initial meeting with the Alumni Association.

V/r,  
CDR (b) (6)

CDR (b) (6)  
6th Battalion Officer  
United States Naval Academy

(b) (6) (o)  
(b) (6) (c)  
)

----- Forwarded message -----

From: **Melissa Nelson** <(b) (6)>  
Date: Tue, Dec 5, 2017 at 10:13 AM  
Subject: RE: USNA Foundation First Gift Program Class of 2018  
To: (b) (6) @usna.edu>  
Cc: (b) (6) @usna.edu>, (b) (6) @usna.edu", (b) (6) @usna.edu>,  
(b) (6) @usna.edu" (b) (6) @usna.edu>, (b) (6) @usna.edu>, Rich Goldsby  
(b) (6) , Rusty Yeiser (b) (6) >

Good morning,

That's wonderful! The next steps are:

- Set a participation goal
- Develop a plan to educate and solicit your classmates for First Gift
- Develop an implementation schedule

Guidance on how to proceed can be found in the presentation we discussed at our meeting. I have also attached for your convenience. I will contact you after the New Year to schedule a meeting at our Hospital Point office to discuss your plan over a pizza dinner.

I am here to support you in any way I can, so please don't hesitate to contact me with any questions.

Best,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6)

**From:** (b) (6) [mailto:(b) (6)@usna.edu]

**Sent:** Tuesday, December 5, 2017 7:07 AM

**To:** Melissa Nelson (b) (6) >

**Cc:** (b) (6)@usna.edu; (b) (6)@usna.edu; (b) (6)@usna.edu

**Subject:** Re: USNA Foundation First Gift Program Class of 2018

Good morning ma'm,

We would like to move forward with the project as we see it as the best method of getting our class in the habit of giving back.

Very respectfully,

MIDN (b) (6)

On Mon, Dec 4, 2017 at 9:33 AM, Melissa Nelson (b) (6) > wrote:

Good morning,

I hope all of you enjoyed your Thanksgiving holiday and are back in full swing for the end of the term.

As promised, I am checking in regarding First Gift. Do you want to move forward with a project this year? Please let me know when convenient and we can briefly discuss next steps.

Thanks!

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6)

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**From:** Melissa Nelson

**Sent:** Wednesday, November 15, 2017 2:41 PM

**To:** (b) (6) <(b) (6)@usna.edu>; (b) (6) <(b) (6)@usna.edu>; (b) (6) <(b) (6)@usna.edu>; (b) (6) <(b) (6)@usna.edu>; (b) (6) <(b) (6)@usna.edu>; (b) (6) <(b) (6)@usna.edu>

**Cc:** Rich Goldsby <(b) (6)@usna.edu>; Rusty Yeiser <(b) (6)@usna.edu>

**Subject:** RE: USNA Foundation First Gift Program Class of 2018

All,

It was wonderful to meet all of you today, and we thank you for meeting with us to discuss the First Gift program. I will touch base after the holiday, and in the meantime please do not hesitate to contact me with any questions.

Warmest regards,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6) (b) (6)

(b) (6)

---

**From:** Melissa Nelson

**Sent:** Tuesday, November 14, 2017 8:12 AM

**To:** (b) (6) <(b) (6)@usna.edu>

Cc: (b) (6) @usna.edu' <(b) (6) @usna.edu> (b) (6) @usna.edu' <(b) (6) @usna.edu>;  
(b) (6) @usna.edu' (b) (6) @usna.edu>; (b) (6) i@usna.edu>; Rich Goldsby  
(b) (6)

Subject: RE: USNA Foundation First Gift Program Class of 2018

Good morning,

Just a reminder of our lunch meeting tomorrow at Dahlgren from 12:00 – 13:00. I have attached the First Gift overview again for your convenience.

We look forward to meeting everyone!

Best,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6) @usna.com

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From: Melissa Nelson

Sent: Thursday, October 26, 2017 8:19 AM

To: (b) (6) @usna.edu>

Cc: (b) (6) @usna.edu (b) (6) @usna.edu; (b) (6) @usna.edu

Subject: RE: USNA Foundation First Gift Program Class of 2018

Good morning,

Excellent - it is on our calendars. I have also invited the 2018 O-Rep CDR (b) (6) to join us, and will send a reminder a few days prior to the meeting.

We look forward to meeting with all of you on the 15<sup>th</sup>.

Warmest regards,

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6)

(F) (b) (6)

(b) (6)

From: (b) (6) [mailto:(b) (6)@usna.edu]

Sent: Thursday, October 26, 2017 7:51 AM

To: Melissa Nelson (b) (6) >

Cc: (b) (6)@usna.edu; (b) (6)@usna.edu; (b) (6)@usna.edu

Subject: Re: USNA Foundation First Gift Program Class of 2018

Good morning ma'am,

We would love to discuss the First Gift program with you, the 15th of November would be the best time for us to meet you.

If we have questions beforehand we'll be sure to send them your way!

Very respectfully,

(b) (6),

MIDN USN

Class of 2018 President

On Wed, Oct 25, 2017 at 10:26 AM, Melissa Nelson <(b) (6)> wrote:

Hello! My name is Melissa Nelson and I am the coordinator for the First Gift Program at the U.S. Naval Academy Foundation located in Beach Hall on Hospital Point. If you aren't familiar with the First Gift Program, I've attached a brief overview for your review . We're excited to start this initiative with you in 2017/18!

As we find ourselves in the thick of the fall semester, I wanted to reach out to all of you about scheduling a meeting with a few of us from the Foundation to begin thinking about 2018's First Gift and the necessary steps moving forward. We would like to meet for about an hour at Dahlgren for lunch,

and looking at our calendars Tuesday, November 7<sup>th</sup>, Wednesday, November 8<sup>th</sup>, Tuesday November 14<sup>th</sup>, or Wednesday November 15<sup>th</sup> from 12pm – 1 pm look to be a good fit. We'd love to meet you for pizza/sandwiches (on us) around noon and review the program and answer any questions you might have. Please let me know which day works best for all of you and we will go from there.

I look forward to working with all of you and please do not hesitate to contact me with any questions.

Thank you!

Melissa

Melissa Nelson

Coordinator, Class Giving Programs

USNA Alumni Association & Foundation

291 Wood Road, Beach Hall

Annapolis, MD 21402

(W) (b) (6) (b)

(F) (b) (6)

(b) (6)

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(b) (6)

MIDN USN

Class of 2018 President

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(b) (6)

MIDN USN

Class of 2018 President







# UNITED STATES NAVAL ACADEMY FOUNDATION

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*First Gift Program*

# Philanthropy at USNA

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## Philanthropy at the Naval Academy

- 5% of the Superintendent's budget comes from private gifts
- This amounts to \$25M/year, mainly through alumni giving

## Annual Giving Program

- A gift from every alum every year
- Create a sustaining culture of philanthropy

## Class Giving Program

- Organized class fundraising projects leading up to 10-year reunions

## *First Gift* Program

- Voluntary monthly allotments upon graduation
- On average, 54% participation rate/class since 2008

# Background

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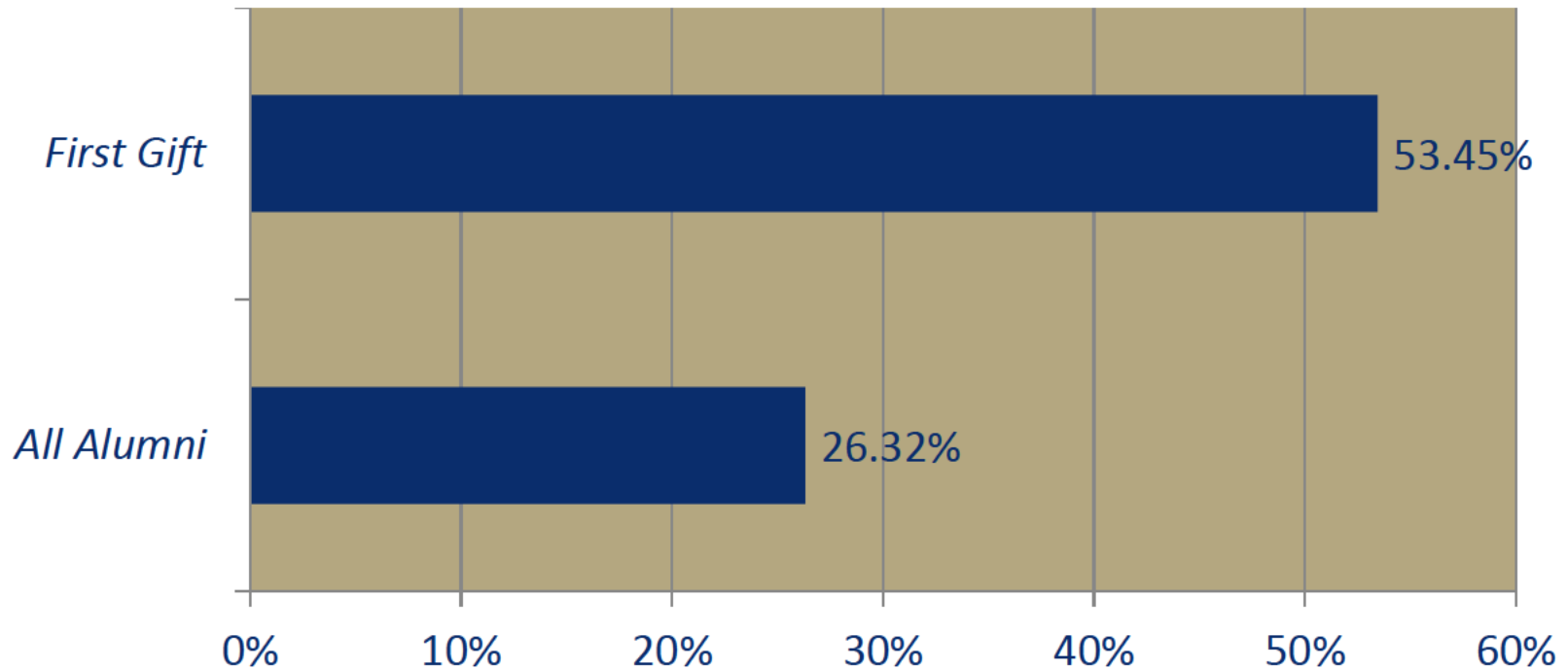
Objective of *First Gift*: facilitate charitable giving among young alumni

- Voluntary
  - No pressure or influence to participate
  - **Program must be endorsed, advocated and executed at the class leadership level**
  - Foundation/Alumni Association facilitate implementation.
- Give nominal amount (**maximum** \$20.18) on a monthly basis
  - Military allotment - automatically deducted from one's pay
  - Allotments begin in July after graduation

# Donor Participation Rate: *All Alumni vs. First Gift classes*

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# Results By Class

	Class of 2009	Class of 2010	Class of 2011	Class of 2012	Class of 2013	Class of 2014	Class of 2015	Class of 2016	Class of 2017
Participation	70.15%	50.80%	29.48%	49.7%	60%	55%	52%	47%	51%
# of donors	564	450	247	409	647	579	599	504	604
Average monthly gift size	\$10.85	\$7.94	\$8.31	\$8.01	\$6.44	\$9.70	\$7.16	\$7.15	\$10
Total after 10 years	\$734,828	\$428,760	\$246,308	\$393,130	\$500,001	\$673,956	\$514,660	\$432,432	\$543,600

**Amount raised as of  
10/24/2017:  
\$588,263 towards  
IPO Support**

# What *First Gift* Supports

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- 75% for 2018 *First Gift* fund
  - 3 years prior to the Class of 2018's 10<sup>th</sup> reunion (2026), Class Leadership will work with the Foundation to determine what their gift will support within the Superintendent's priority list. The fund is conservatively invested until that time.
- 25% for USNA Annual Fund which supports:
  - Unrestricted fund for Supe's support of USNA mission
  - Benefits provided to Alumni by Alumni Association
  - Fundraising operations

# Class of 2008 & 2009

## 10 Year Reunion Project

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- 2008 Class leadership worked with Foundation staff in 2016 to determine two components for 10 year project:
  - 75% to Midshipmen Action Group (MAG)
  - 25% to USNA Annual Fund
- 2009 Class leadership worked with Foundation staff in 2017 to determine two components for 10 year project:
  - 85% to International Programs Office (IPO)
  - 15% to USNA Annual Fund

# Class of 2008 10 Year Reunion Project (con't)

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- The Class of 2008 has raised \$339K as of 10/24/2017 and is on track to raise over \$400K for their 10<sup>th</sup> year reunion in 2018.
- The Class of 2009 has raised \$589K as of 10/24/2017 and is on track to raise nearly \$700K for their 10<sup>th</sup> year reunion in 2019, the largest 10 year reunion gift **EVER** in the history of the USNA Foundation.



# Class of 2018 *First Gift* Program Implementation

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- Foundation brief Class of 2018 Leadership (11/15/2017)
- Class of 2018 Leadership *First Gift* program planning (Nov - Dec 2017):
  - Goals
  - Education and Peer Solicitation Plan
  - Implementation Schedule
- Presentation of Class of '18 Class Leadership Plan to Foundation (January 2018)
- Battalion Receptions (February – March 2018)
- Implementation of Plan (February - May 2018)



Next

# Key Elements to a Successful *First Gift* Program

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- Class leadership buy in, involvement, and tenacity
- Creating a plan
- Defined goals and timeline
- Enlisting volunteers beyond class leadership
  - Battalion Reps – Good
  - Company Reps – Better
- Education – Why private gifts to USNA are important to midshipmen
- Marketing

Foundation can provide marketing and educational materials

# Foundation Recommendations

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Goal for 2018  
>60% participation

# Foundation Recommendations

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- Expand beyond just class officer involvement
  - Suggestions:
    - Assign a class officer to each Battalion
    - Find a representative within each company
    - Formulate a First Gift committee
  - Foundation can assist in providing training
- Marketing
  - Emails by Class President/leadership
  - Physical marketing piece(s)
  - Battalion Receptions
  - USNAF is ready and able to support you for all of these initiatives
- Make use of Battalion Receptions (January – March)
- ALITC Involvement ('68)

# Lessons Learned

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- Committed Class Leadership is the key to success.
- Asking a group to support the project doesn't work. Asking individuals does.
- Delegate! Delegate! Delegate! Trust but verify.
- Ensure your classmates understand WHY giving back to the USNA is important – the government doesn't pay for everything by a long shot!

# Approach by Class

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## 2008 - #1 in 2008 in alumni participation with 60.54%

- Very focused class president that took it on as his personal mission to set the bar high.
- Visited each company to present *First Gift*
- Always had allotment forms with him and kept a running list of those that participated and those that didn't so he could track people down.
- Solicitation took place between spring break and finals

## 2009 - #1 in 2009 in alumni participation with 70.15%

- Excellent leadership by class president with highly involved class officers.
- Took *First Gift* very seriously and made it a class priority to do better than 2008.
- The class officers were each assigned specific companies to visit, make the pitch and collect forms on the spot. Often the class officers made multiple trips back to visit each company to increase participation.
- Solicitation took place between spring break and finals

# Approach by Class (con't)

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## 2010 - #3 in 2010 in alumni participation with 50.8%

- Class president was overextended.
- Dropped off allotment forms in Wardrooms and talked to as many people as they could.
- Used Battalion Receptions to educate classmates
- Made pitch at indoor graduation practice that doubled their numbers at the last moment.
- Solicitation took place in April and May

## 2011 - #25 in 2011 in alumni participation with 29.48%

- Class president was overextended.
- Chose not to enlist the help of other volunteers.
- Organized specific project to raise money for: 9/11 Memorial. Class leaders thought that the solicitation would be easy b/c of the 9/11 memorial project. However, the class did not rally behind this effort or this cause.
- Used Battalion Receptions to educate and solicit classmates
- Class leadership thought that classmates would voluntarily sign up for allotment without any push from leadership. **Didn't happen.**
- Solicitation took place from February - May

# Approach by Class (con't)

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- **2012 - #7 in 2011 in alumni participation with 49.7%**
  - Class President and Officers very invested.
  - Each took 1-2 Battalions and held individual meetings
  - Made more than one trip to each company to educate and then to collect allotment forms
  - Used Battalion Receptions to educate-Treasurer attended all-President most
  - Did Email education blasts
  - Started one week after Spring Break
  - Did utilize graduation practice as a catch all
- **2013 - #4 in 2013 in alumni participation with 60%**
  - Class President and Officers very invested.
  - Class President attended all meetings and Battalion Receptions (other officers filled in as needed)
  - Started 3 weeks after Spring Break
  - Solicitation took place from April – May
  - Did NOT incorporate company reps into solicitation
  - Utilized out-processing as a catch-all for final participation numbers(very successful)



# Approach by Class (con't)

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- **2014 - #4 in 2014 in alumni participation with 55%**
  - Class President and Officers very invested.
  - Class President attended all meetings and did brief presentation at each Battalion Reception (other officers filled in as needed)
  - Started 3 weeks after Spring Break
  - Solicitation took place from April – May
  - Did NOT incorporate company reps into solicitation
  - Utilized out-processing as a catch-all for final participation numbers
  - Class was organized during the planning stages, but became less organized once the solicitation began.
  - Class President took everything on his shoulders, which resulted in lower numbers than they were striving for (60%)

# Approach by Class (con't)

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- **2015 – 52% participation**

- Class President and Officers were skeptical in the beginning, but through relationship building between the class and the Foundation they came to see the benefits they could provide to the Academy and the Brigade through the *First Gift* program.
- Class was organized during the planning stages, but became less organized once the solicitation began.
- Class President attended all meetings and did brief presentation at each Battalion Reception (other officers filled in as needed)
- Did NOT incorporate company reps into solicitation
- Solicitation was scheduled to take place after spring break, however, the class procrastinated and did not take action on a formal solicitation until out-processing. Note: This is why building a plan of action prior to the Battalion Receptions is crucial.
- Utilized out-processing as a catch-all for final participation numbers
- Class President took everything on his shoulders, which resulted in lower numbers than they were striving for (60%)

# Approach by Class (con't)

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- **2016 – 47% participation**

- Class Leadership supported First Gift from the beginning and all Class leadership was highly involved in the entire process.
- Class Leadership attended all meetings and one or more of Class Leaders did brief presentation at each Battalion Reception.
- Incorporated company reps into solicitation
  - Held an hour long brief for all company reps
  - Delegated form distribution and collection to company reps
- Class was organized during the planning stages and implemented plan successfully, **however**, plan broke down at company rep level. Only 60 forms were returned to the Foundation prior to out processing.
- Utilized out-processing as final catch all for class participation
- All Class Leaders were heavily involved during out processing push, however, participation was lower than expected due to the break down at company rep level.

# Approach by Class (con't)

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- **2017 – 51% participation**
  - Class Leadership supported First Gift from the beginning and all Class leadership was highly involved in the entire process.
    - Delegated main POC to one person
    - Class Officer briefed with Class Leadership and supportive of effort
  - Class Leadership attended all meetings and one or more of Class Leaders did brief presentation at each Battalion Reception.
  - Designated company reps for solicitation
    - Held an hour long training for all company reps
    - Delegated form distribution and collection to company reps
  - Class was organized during the planning stages and implemented plan successfully with approx. 120 forms returned prior to out-processing
  - Utilized out-processing as final catch all for class participation
  - All Class Leaders were heavily involved during out processing with at least two officers present at all times

# *First Gift POCs*

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Rusty Yeiser '74

Senior Director, Annual Programs

(b) (6)

Rich Goldsby '72

Associate Director, Class Legacy Gift Programs

(b) (6)

Melissa Nelson

Coordinator, Class Giving Programs

(b) (6)

# *First Gift Program*

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Thank you!

Q&A